Project Management Institute.

LESSON 1

CREATING A HIGH-PERFORMING TEAM

- Build a Team
- Define Team Ground Rules
- Negotiate Project Agreements
- Empower Team Members and Stakeholders
- Train Team Members and Stakeholders
- Engage and Support Virtual Teams
- Build a Shared Understanding about a Project

Build a Team

TOPIC A

Deliverables and Tools

- Skills list
- Technology
- Resource Management Plan
- Rates
- Resource assignment

- RACI matrix
- Pre-assignment tools
- Virtual teams

Project Resource Management includes the processes to identify, acquire and manage the **human resources** needed to successfully complete a project.

Project Team

DEFINITION

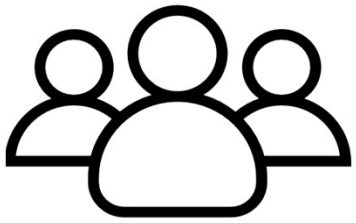
A set of individuals who support the project manager in performing the work of the project to achieve its objectives.

Project Teams

To assemble your high-performing project team:

- ✓ **Estimate, acquire, and manage teams** of people as well as human resources required outside of the team - special skills.
- ✓ Create an **effective team environment** with excellent communication and talent development capabilities.
- ✓ Track team **performance**, create and execute **improvements** based on feedback, **resolve issues**, and **manage** team personnel changes.

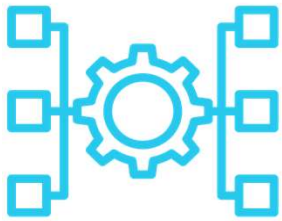
Project Team Member Requirements



Ensure relevant skill sets to perform work and produce the desired results.

Avoid single-points-of-failure
e.g. a single resource has a required skill.

Leverage core competencies and skills of general specialists to support other areas of the project.



Adequate physical resources
e.g. equipment

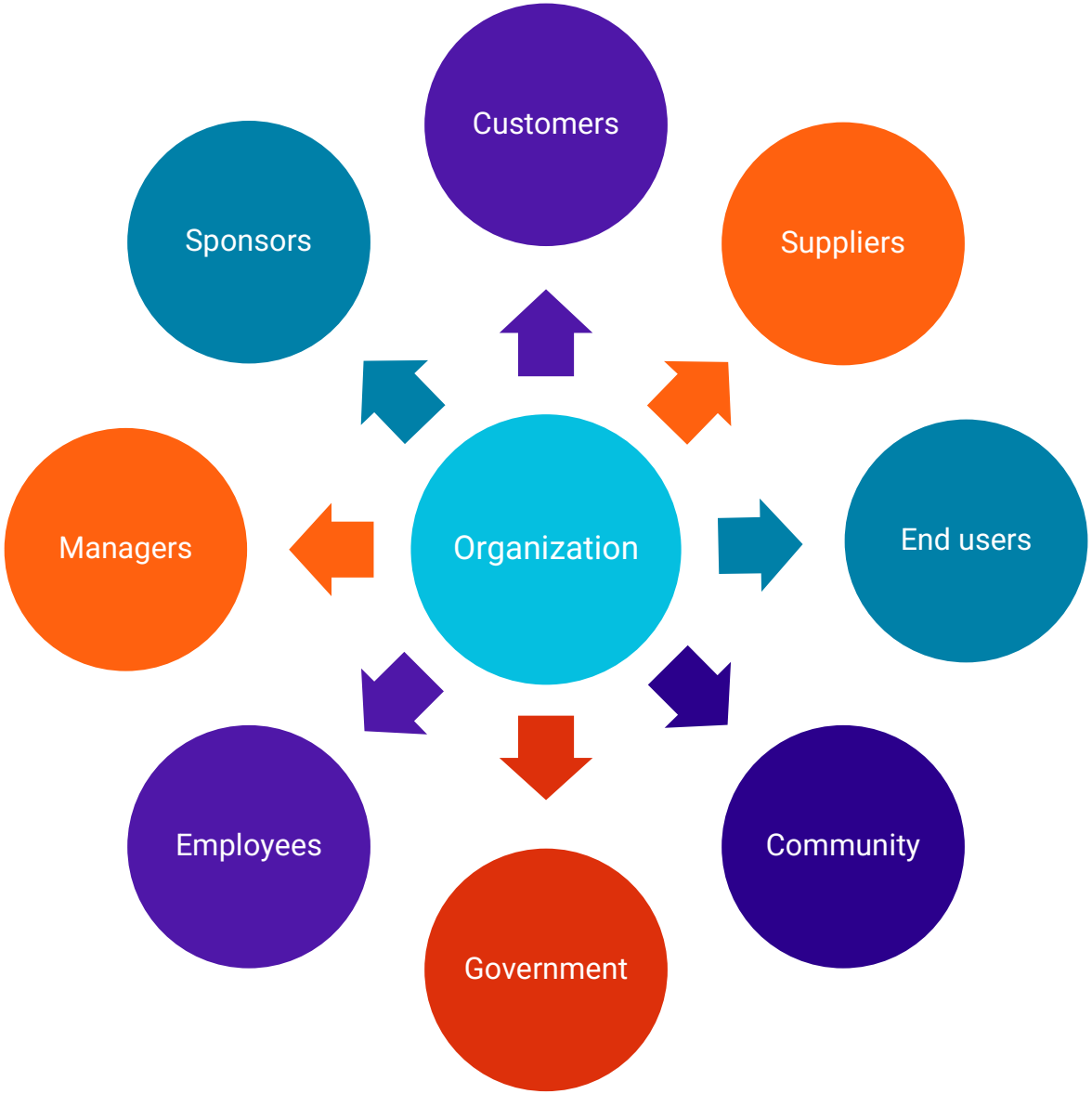
Other requirements
e.g. access rights

Stakeholder

DEFINITION

An individual, group, or organization that may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a project, programs, or portfolio.

Project Stakeholders



Stakeholder Identification

Identify the People

- ✓ Usually done during project charter development; continues as needed.
- ✓ Analyze and document stakeholder interest, involvement, interdependencies, influence, and potential impact on project success.
- ✓ Look for additional stakeholders in change logs, issue logs, or requirement documents as work progresses.

Create the Register

- ✓ The stakeholder register may be affected by organizational environment factors.
- ✓ Project plans should describe stakeholders and the planned engagement model.
- ✓ Refer to stakeholder registers from previous projects.

Stakeholder Identification - Tools & Techniques

- ✓ Expert judgment
- ✓ Data gathering
  - Questionnaires and surveys
  - Brainstorming
- ✓ Data analysis
  - Stakeholder analysis
  - Document analysis
- ✓ Stakeholder mapping
  - Two-dimensional grids
    - Power/interest
    - Power/influence
    - Impact/influence
  - Stakeholder cube
  - Directions of influence
- ✓ Meetings

Stakeholder Register

DEFINITION

A list of individuals or organizations who are actively involved in the project, whose interests may be negatively or positively affected by the performance or completion of the project and whose needs or expectations need to be considered.

Stakeholder Register

STAKEHOLDER REGISTER

Name	Organization	Project Role	Major Requirements	Expectations	Influence	Areas of Interest	Internal/External	Supporter?
Linda Michaels	CEO	Sponsor	Budget, schedule, quality	Community involvement	Major	Community	Internal	Yes
Ron Gordon		Mortgage lenders		Growth	Major	Development	External	Yes
	Community		Neighborhood improvements		Minor	House	External	Yes
Andrews family		Homeowners		Engage family and friends				Yes
	Lumber warehouse	Vendor			Major	Locally sourced supplies		
		Project Manager		Project goes as planned	Major	All	Internal	Yes

RACI Chart

DEFINITION

A common type of responsibility assignment matrix (RAM)
Responsible, Accountable, Consulted, and Informed statuses define the involvement of stakeholders in project activities.

RACI Chart - Example

	Project Manager	Engineering Manager	Quality Assurance Manager	Purchasing Manager	Manufacturing Manager
Create blueprints	A	R	C		C
Manufacture circuit board	I	A	C		R
Test circuit board	I	R	A		C
Order components	C	C	I	R	A
Assemble	I	C	C		R

R = Responsible A = Accountable C = Consulted I = Informed

Team Skills Appraisal

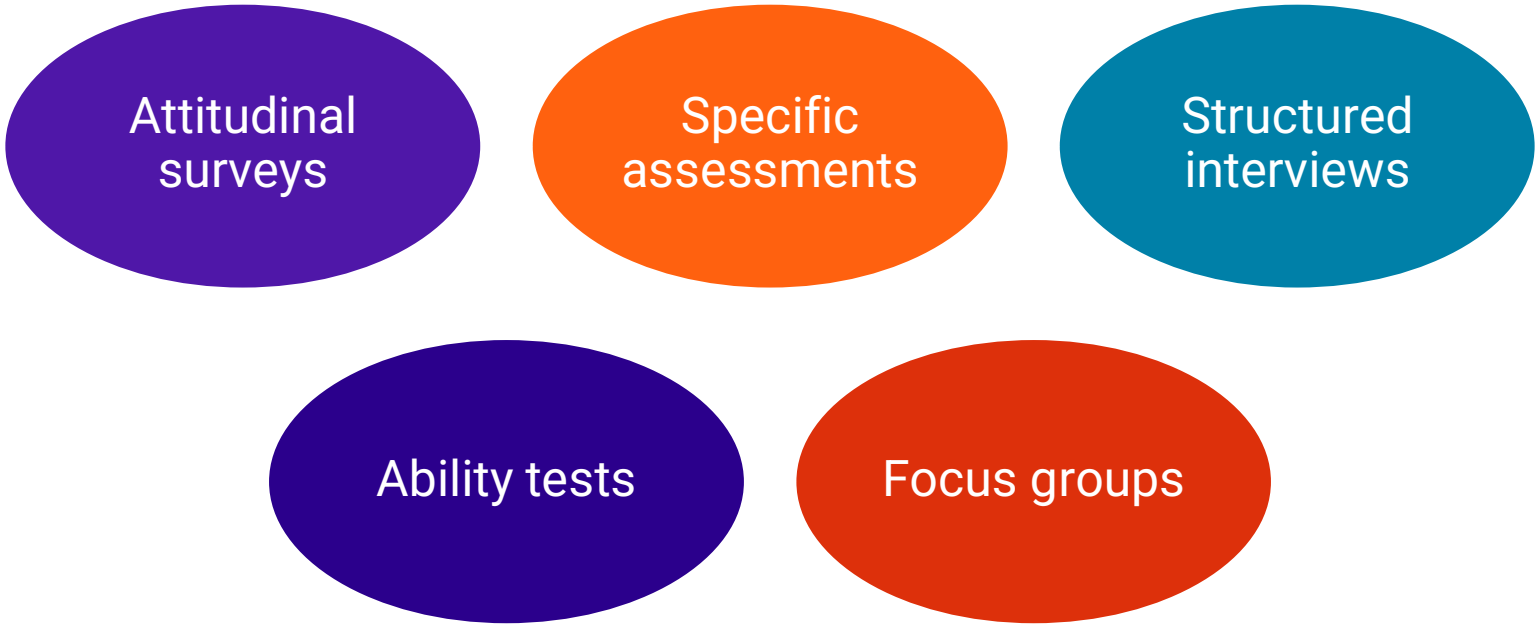
Appraisals enable the team to **holistically identify its strengths and weaknesses**, assess **opportunities for improvement**, build **trust**, and establish **effective communication**.

Appraisals might identify:

- ✓ Team preferences
- ✓ Aspirations
- ✓ Information processing and organization
- ✓ Decision making processes
- ✓ Interactions with other team members

Pre-Assignment Tools

Assess candidates before assigning and confirming team roles.



Diversity, Equity and Inclusion

Project teams are global and diverse in **culture, gender, physical ability, language**, etc.

Create an environment that **optimizes the team's diversity** and builds **climate of mutual trust**.

Team development objectives should:

- ✓ **Improve trust** to raise team morale, reduce conflict, and support teamwork.
- ✓ Create a **collaborative culture** to improve individual and team performance and facilitate cross-training and mentoring.
- ✓ **Empower the team** to participate in decision making and own the solutions they create.

Resource Management Plan

DEFINITION

The project document that identifies resources and how to acquire, allocate, monitor, and control them.

Resource Management Plan

Roles and Responsibilities

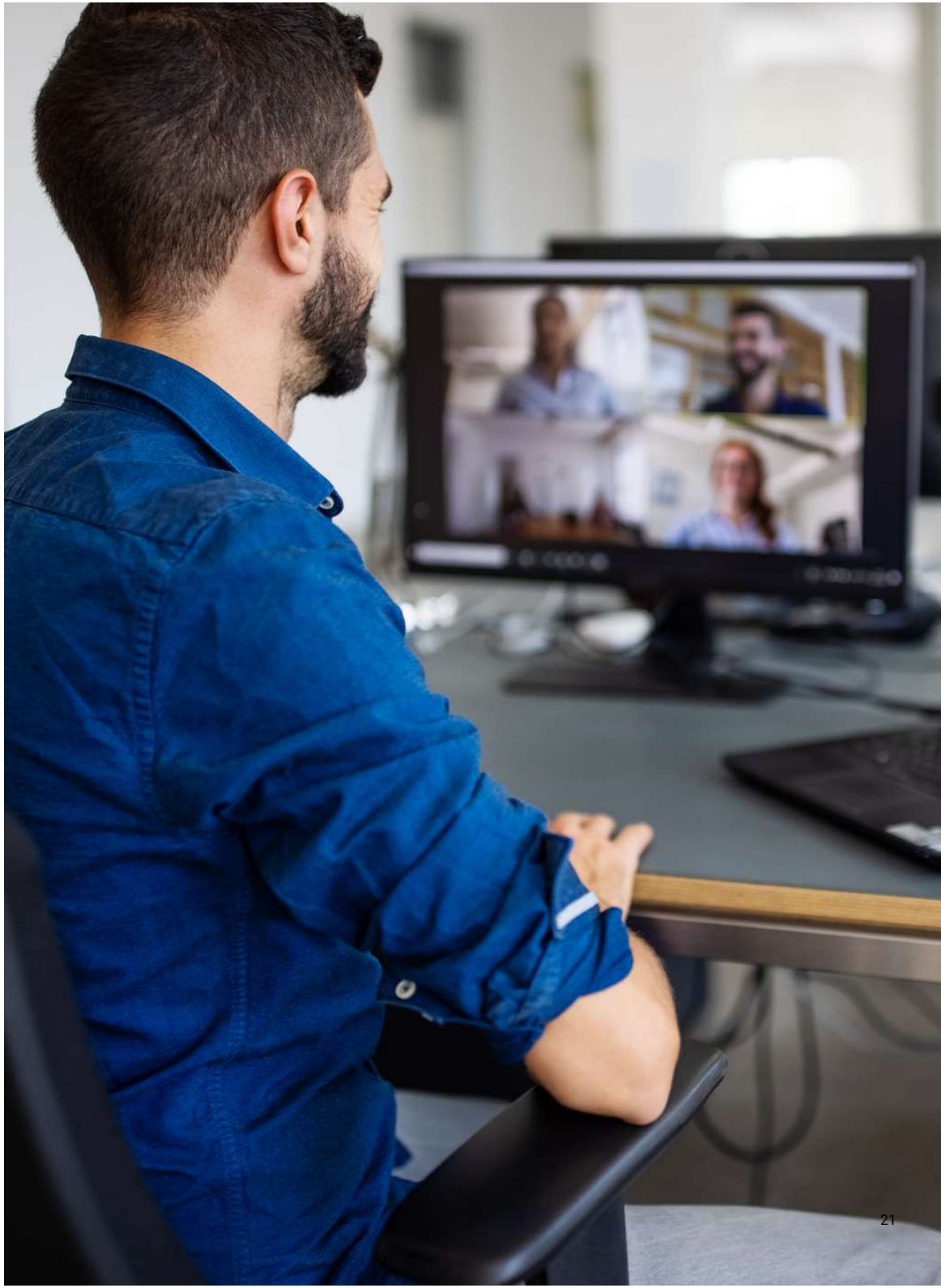
- ✓ Role – A person's function in a project
- ✓ Authority - Rights to use resources, make decisions, accept deliverables.
- ✓ Responsibility - Assigned duties
- ✓ Competence - Skills and capacities required

What's in the Plan

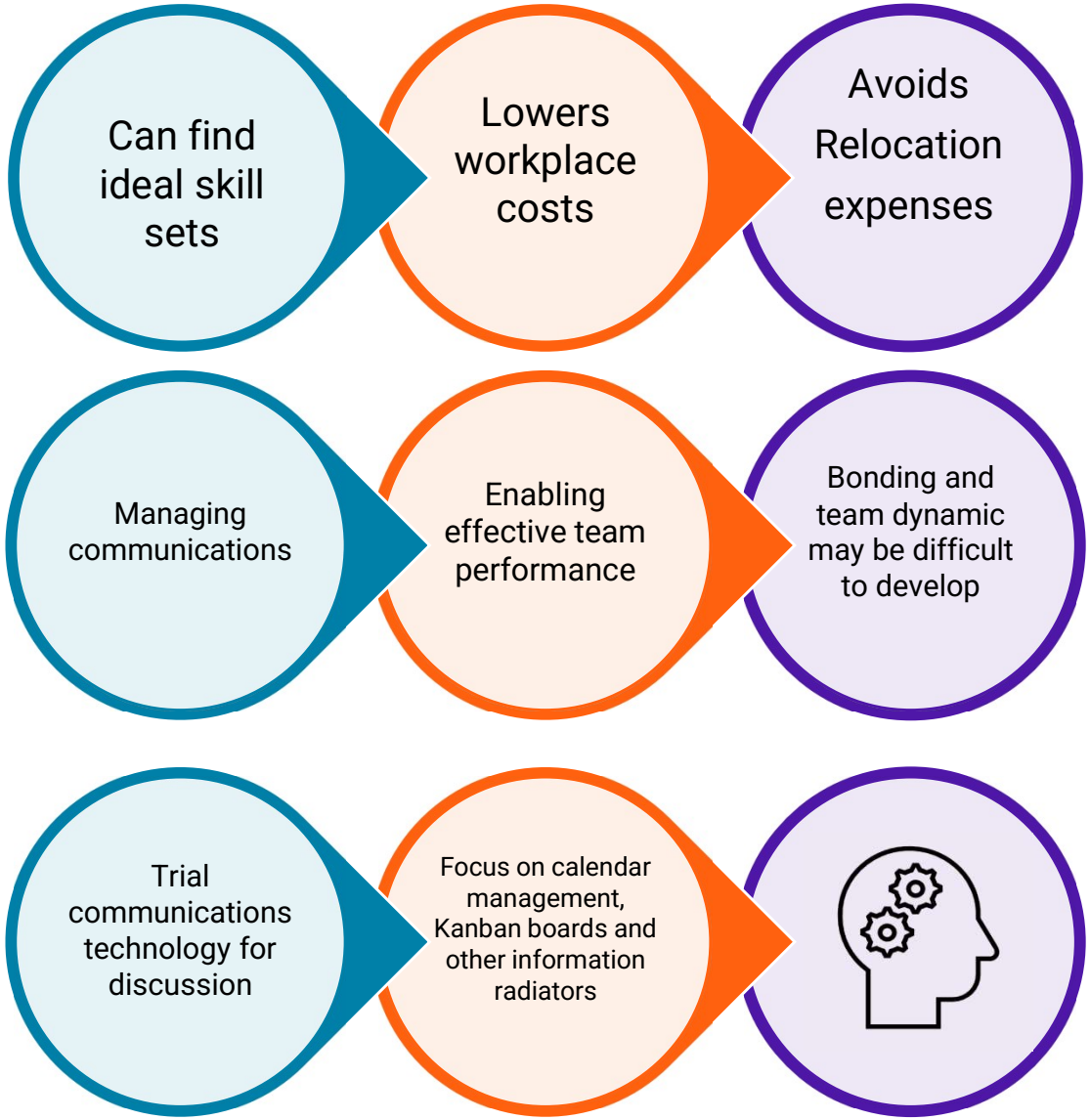
- ✓ Project Organization Chart – visualization of team and reporting relationships
- ✓ Project team resource management - Team resource guidance – How to define, staff, manage, and release.
- ✓ Training strategies and requirements
- ✓ Team development methods
- ✓ Resource controls – To manage physical resources
- ✓ Recognition Plan - To reward/recognize team members

Virtual Teams

- ✓ Team members share goals but spend little or no time meeting face-to-face.
- ✓ Addressing their needs takes some different skills.



Virtual Team Considerations



Assign Project Responsibilities

Tailor according to team, needs, project.

Consider **technical and "soft" factors**:

- Experience, knowledge, skills
- Attitude, global/regional representation

Agile - Self-organizing teams assess work requirements and determine who will do the work.

Traditional – You assign work to team members with a work breakdown structure (WBS).

Rates

The project manager is responsible for considering resource cost factors.

Meet resource requirements cost-effectively and based on:

- ✓ Project needs
- ✓ Suitability of the Resource
  - Availability
  - Experience
  - Knowledge
  - Skills
  - Attitude
  - Regional or linguistic representation

Resource Assignment

Create a project management plan that includes:

- ✓ Team members assigned to the project
- ✓ Their roles and responsibilities
- ✓ Project team directory
- ✓ Project organization charts
- ✓ Project schedules

Nurturing Team Performance

Ensure the team has the **knowledge, skills, attributes, and experience** required to produce positive project outcomes.

Gain a better understanding of customer needs and team capabilities to **identify gaps in the team's skill set**.

Check for these gaps frequently and seek to close them. Try:

- ✓ New or better resources
- ✓ Training to enable the team to develop missing skills
- ✓ Additional customer engagement to gather data

Knowledge Transfer In and Between Teams

Facilitate collaboration and promote visibility of work.

Manage knowledge sharing among team members, especially on virtual teams.

Check the team charter for knowledge sharing methods, including:

- ✓ Frequency of updates
- ✓ Version control
- ✓ Supporting tools and agreed approach to their use

Use information radiators to provide seamless visibility into project status across the stakeholder community.

Define Team Ground Rules

TOPIC B

Deliverables and Tools

Team charter

Team norms

Negotiation skills

Conflict management

Brainstorming

Ethics

Team Norms

Establish expected team behaviors **at the beginning of the project**.

Enable teams to handle challenges as the project progresses.

Include guidelines and techniques for:

- ✓ Meetings
- ✓ Communications
- ✓ Conflict management
- ✓ Shared values
- ✓ Decision-making

Align with PMI's Code of Ethics and Professional Conduct

PMI Code of Ethics and Professional Conduct

Team Charter

DEFINITION

A document that enables the team to establish its values, agreements, and practices as it performs its work together.

Team Charter

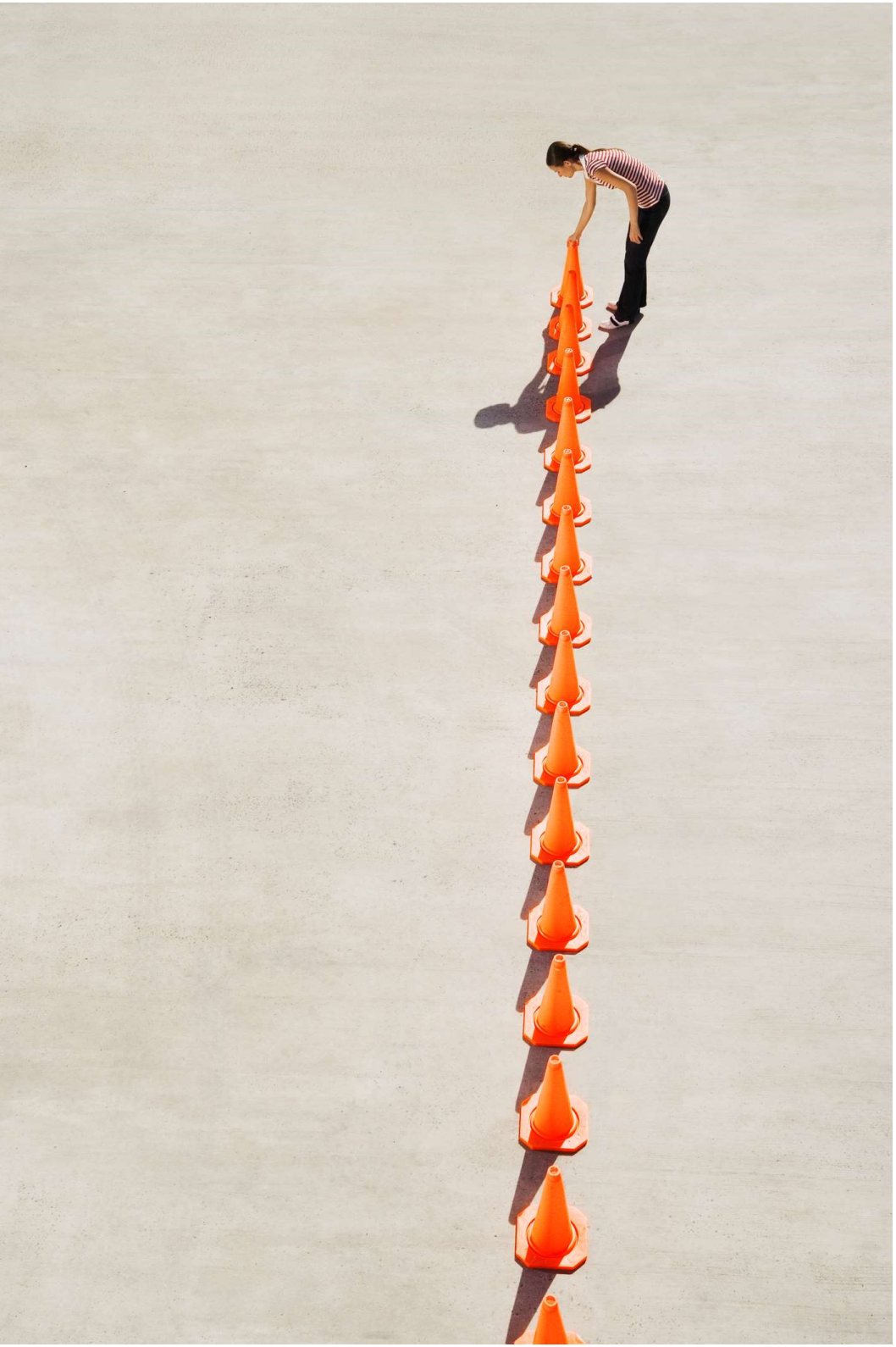
Includes:

- ✓ Shared values
- ✓ Guidelines for communications and use of tools
- ✓ Decision-making guidelines
- ✓ Conflict resolution measures
- ✓ Meeting time, frequency, and channel
- ✓ Other team agreements e.g. shared hours, improvement activities

Ground Rules

DEFINITION

As defined in the team charter, clear expectations set, regarding the code of conduct for team members.



Ground Rules

Includes what's acceptable and unacceptable for team behavior

Benefits:

- ✓ Sets performance and communication expectations
- ✓ Decreases risk of confusion
- ✓ Improves team performance

Negotiation Skills

Includes internal and external conversations towards reaching agreements.

Determine reliable methods to ensure communication is aimed at reaching consensus. This keeps the team culture healthy.

Team members might negotiate:

- ✓ Roles and responsibilities
- ✓ Priorities
- ✓ Assignments

Internal and External Team Member Communication

- ✓ Communicate **regularly**
- ✓ **Collaborate** between team and external teams or stakeholders
- ✓ **Manage expectations** effectively among stakeholders
- ✓ Include communication protocols in **Team Charter**:

  - **Internal:** team meetings, shared calendars, etc.

  - **External:** stakeholder feedback, dependency management, alignment with goals or expectations

Conflict Management

Apply strategies or resolution methods to deal with disagreements

- ✓ Leads to improved understanding, performance, and productivity
- ✗ Ineffective conflict management leads to:
  - Destructive behavior
  - Animosity
  - Poor performance
  - Reduced productivity

GUIDELINES

Manage and Rectify Ground Rule Violations

- Establish ground rules in the Team Charter. Focus on core values including accountability, shared expectations, and transparency
- Team and project manager respond to violations of the ground rules.
- For serious violations, you may need to remove or replace the offending team member.

Negotiate Project Agreements

TOPIC C

Deliverables and Tools

Service Level Agreement

Performance report

Resource calendars

Go-Live Blackouts

Negotiation skills

Expert judgment

Lessons learned

Project Agreement Objectives

Reporting and verification criteria for objectives are an important part of the project agreement.

Traditional – Identify each deliverable and objective acceptance criteria for each.

Agile – Deliverables will vary as the product backlog is added to, reprioritized, and so forth.

Each story needs to have clearly defined acceptance criteria approved by the customer.

The project may also specify a **Definition of Done** for the project, releases, iterations, and user stories.

Agreements

Agreements define **initial intentions** for a project. These can be:

- ✓ Contracts - used for external customers
- ✓ Memorandums of understanding (MOUs)
- ✓ Service level agreements (SLA)
- ✓ Letters of agreement or intent
- ✓ Verbal agreements
- ✓ Email

Sample Service Level Agreement

Service Scope and Description Statement

The agreement covers the provision and support of a Service, which provides end user computer support. The DESKTOP COMPUTING SERVICE consists of the hardware, software, and supporting infrastructure for user personal computers running the Windows operating system.

Service Availability

Desktop Service is required along with Network/Intranet for access to other services. Required availability for these services is 99.5 percent uptime not counting planned maintenance times. The 99.5 percent availability metric will be measured by a rolling 6-month period.

Reliability

The service is guaranteed not to break more than three times per year. A break is defined as the loss of access to a vital business function.

Service Performance

Designed for high performance, the desktop should not keep the user waiting for response to an input for more than two minutes out of any five-minute window. Any failures must be reported to the Service Desk for incident resolution.

Change Management Procedures

Any proposed change by the Customer must be submitted through the Service Desk for review. A notice of acceptance/denial and reason for such must be within five business days of the next CAB meeting for Normal changes or three days for Standard changes. Emergency changes will be dealt with immediately by the Service Desk Manager.

Service Reviews

Reviews of the service will be conducted by the Service Level Management in conjunction with the Customer at least annually as well as after a major outage or change.


Always aim to reach agreement during negotiations.

Negotiation Strategy

Procurement manager drives negotiations for the exact parameters of a contract.

Project manager and project teams engage in negotiations.

Agile - Exact deliverables will vary as the customer modifies, adds, and reprioritizes items in the product backlog.

Therefore, define clearly delineated ways to ensure agreed performance levels.

Traditional – An important objective clearly designates the project's intended deliverables and how they will be measured and compensated.

Negotiations

Documents used either in reaching an agreement or produced as the result of an agreement:

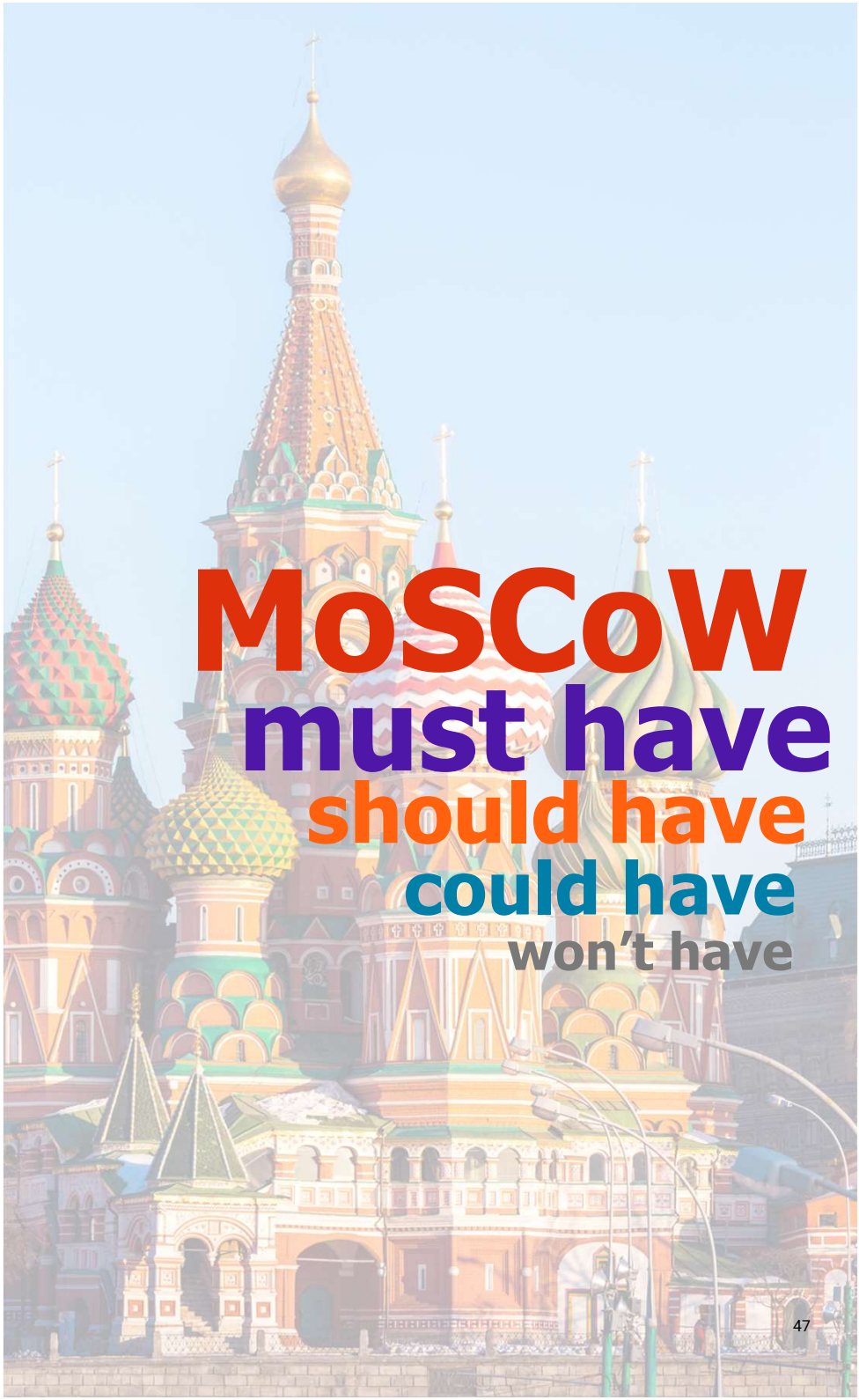
- ✓ A statement of work or major deliverables
- ✓ A schedule with milestones and dates
- ✓ Performance reporting expectations
- ✓ Pricing and payment terms
- ✓ Inspection, quality requirements, and acceptance criteria
- ✓ Warranty and future support
- ✓ Incentives or penalties
- ✓ Insurance and performance bonds
- ✓ Subcontractor approvals
- ✓ Terms and conditions
- ✓ Change request handling
- ✓ Termination clauses and dispute resolution

Prioritization Techniques to Determine Objectives

Use appropriate methods to learn the order of work that needs to be done.

These can include:

- ✓ Review product backlog
- ✓ Kano Model
- ✓ MoSCoW (MSCW) Analysis
- ✓ Paired Comparison Analysis
- ✓ 100 Points Method

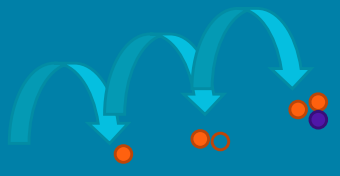


Performance Reports

- ✓ Percentage of work completed
- ✓ Quality and technical performance metrics
- ✓ Start and finish of scheduled activities
- ✓ Change requests
- ✓ Defects
- ✓ Actual costs and durations

Work performance data is integrated and contextualized to:

- ✓ Generate decisions
- ✓ Raise issues, actions, and awareness



Agile projects, include:

- ✓ Completed and accepted stories
- ✓ Product backlog progress
- ✓ Comparison of stories delivered and iteration plans

Expert Judgment

DEFINITION

Judgment based upon expertise in an application area, knowledge area, discipline, industry, etc., as appropriate for the activity being performed. Such expertise may be provided by any group or person with specialized education, knowledge, skill, experience, or training.

Experts

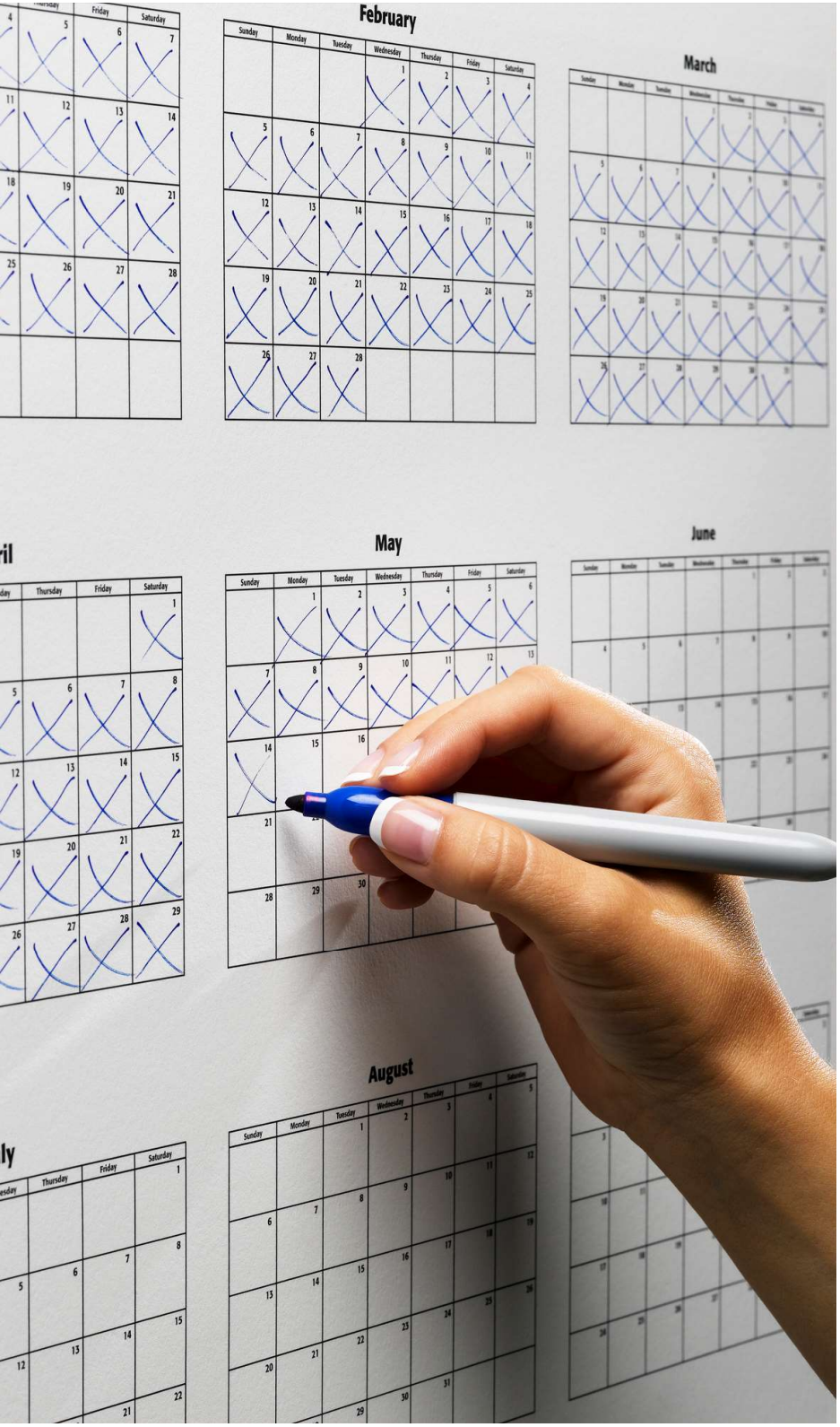
Experts who can provide judgment include:

- ✓ People from other areas of the organization
- ✓ Consultants
- ✓ Stakeholders
- ✓ Professional and technical associations

Resource Calendars

DEFINITION

Identify working days, shifts, and when specific resources are made available to the project.



Resource Calendars

Determine **available resources** (people, equipment, material, etc.) during a planned activity period.

Use when **estimating project activities**.

Identify key resource attributes (skills and experience levels) to ensure that **appropriate and required resources will be available** for different aspects of the project.

Review team performance and identify lessons learned regularly

Lessons Learned Register

DEFINITION

A project document used to record knowledge gained during a project so that it can be used in the current project and entered in the lessons learned repository.

Lessons Learned

Identify specific improvements that will **improve the team's overall efficiency and effectiveness**.

Agile teams hold a **retrospective** at the end of each iteration to identify potential issues, identify potential solutions, and improve the processes the team uses to improve its overall performance.

Special Intervals

Projects may require scheduled “down” time from work for various reasons. Negotiate how and when these will take place according to project and team needs.

For example:

Black-Out times when deliverables are handed over for implementation.

- ✓ Suspends changes
- ✓ Reduces risks as the solution is released to customers
- ✓ May be negotiated in advance based on the overall project schedule and timeline.

“Go Live” occurs at the end of the project timeline.

Agile – Uses iterations, or numerous releases of aspects of the solution over the project's timeline, and black-out times, if needed, will be negotiated as the project approaches a release threshold.

Empower Team Members and Stakeholders

TOPIC D

Deliverables and Tools

Decisions

Estimates

Team decision-making tools

Brainstorming

Fist of Five

Roman voting

Polling

Planning poker

Dot voting

Retrospective

Team Strengths

When forming teams, it's critical to understand the skills and competencies needed to perform project work and produce deliverables.

Identify team strengths and weaknesses to **organize around team strengths.**

As teams progress, leverage team members' skills to improve team performance.

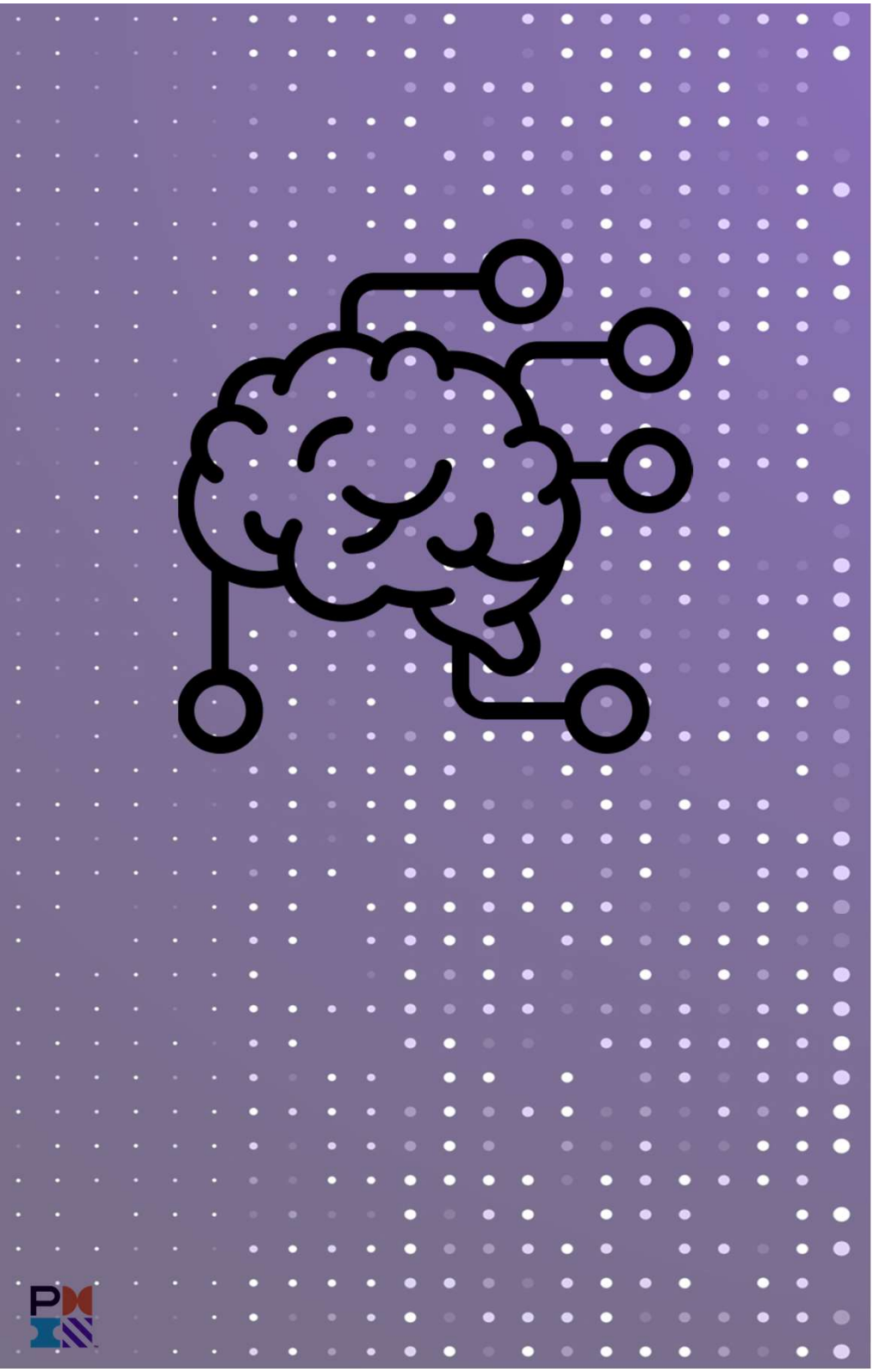
Team Decision-Making Tools

Deciding how you will work together is important. While the Team Charter addresses decision-making and conflict resolution criteria, the **team will establish their own norms**.

For example, seeking consensus may be highly desirable, but decide how to respond when consensus can’t be reached.

The team can decide in advance to take the highest estimate in case of persistent disagreements.

Any project team should establish its own **Way of Working (WoW)**.



Brainstorming

An **ideation technique** for teams.

A facilitator works with the team to identify potential solutions to a given problem.

Team performs various types of analysis to select the most appropriate alternatives.

Estimates

People doing the work should be estimating tasks because they know:

- ✓ the risks
- ✓ the level of effort
- ✓ the potential pitfalls

Traditional - Use hours of effort.

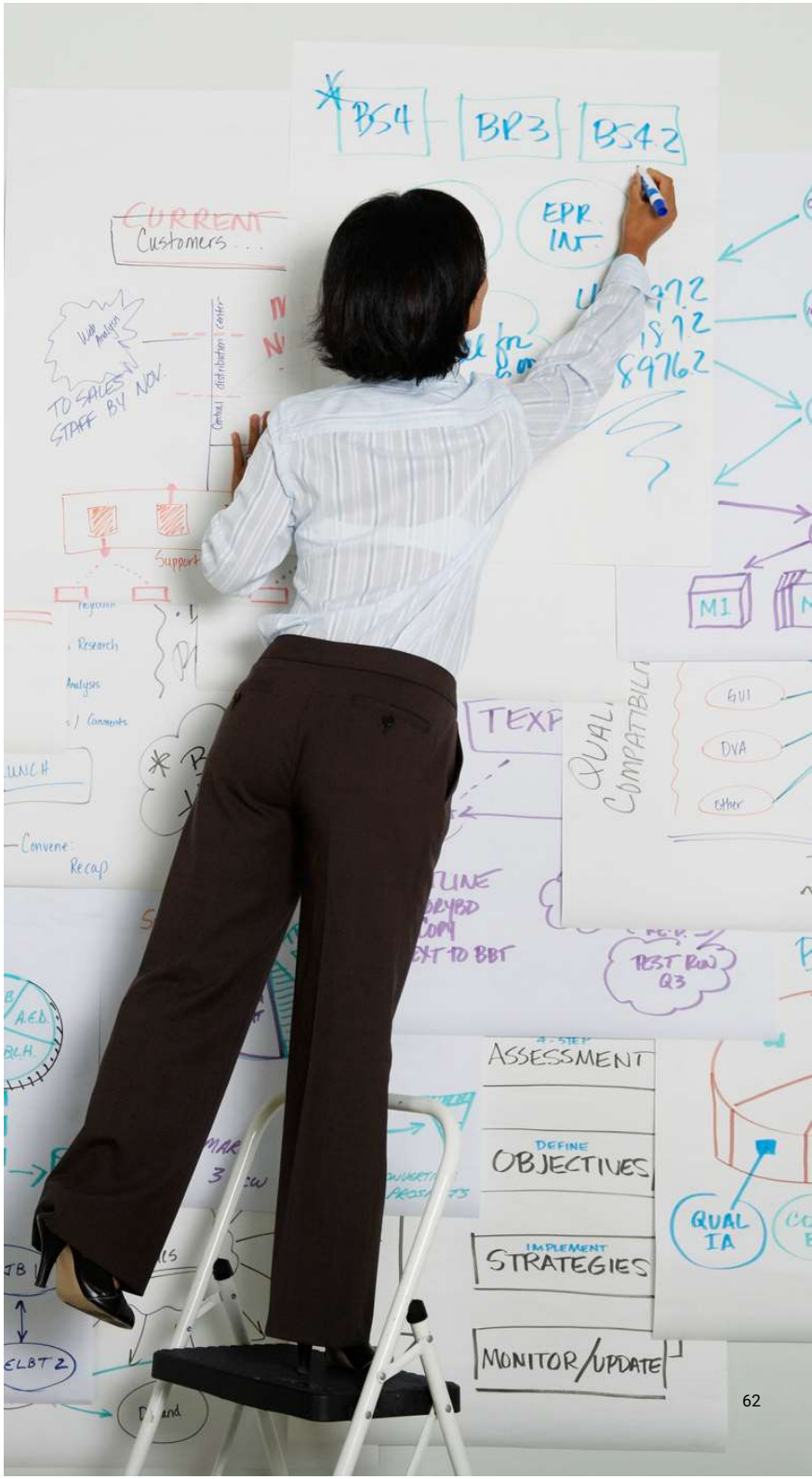
- ✓ Three-point estimating asks the estimators to provide the most likely (tM); optimistic (tO); and pessimistic (tP) estimates then divide by three:

  $$tE = (tO + tM + tP) / 3$$

- ✓ Other methods include analogous, parametric, bottom-up estimating

Agile - Avoid using absolute time estimates.

Story Point technique uses points, not time units, to estimate the difficulty of implementing a user story. It's an abstract measure of effort required to implement work.



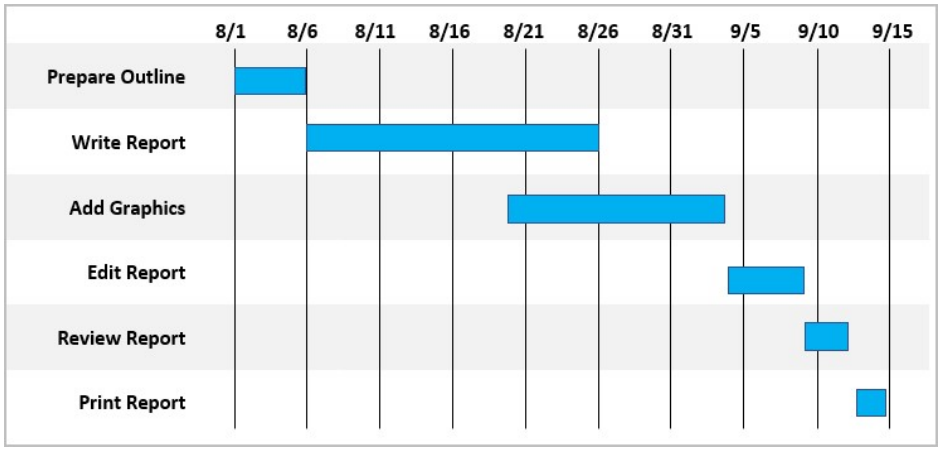
Team Task Accountability

Encourage team members to self-organize in determining:

- ✓ What work needs to be done
- ✓ How to perform the work
- ✓ Who should perform it

Use Gantt charts and Kanban boards to promote visibility and collaboration.

Agile - Team commits to performing work in an iteration.



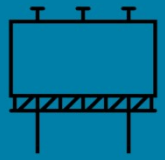
Gantt Chart

Kanban Board

Retrospective

- ✓ A regular check on the effectiveness of quality processes
- ✓ Look for the root cause of issues then suggest trials of new approaches to improve quality.
- ✓ Evaluate any trial processes to determine if they are working and should be continued, need adjusting or discontinued.

Retrospective



Set the Stage

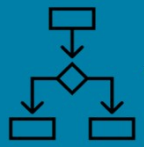
Check-in activities to engage the team

Gather and Share Data

- ✓ Team Performance metrics
- ✓ Earned Value Analysis

Generate Insights

- ✓ What's working?
- ✓ Where are challenges?
- ✓ Problem analysis



Make Decisions

Agree on a few improvements or changes to try in the subsequent iteration

Close

- ✓ New information
- ✓ Appreciation
- ✓ Thanks

GUIDELINES

Evaluate Demonstration of Task Accountability

- Determine how to track and manage task accountability.
- Use a Work Breakdown Structure (WBS) to identify the tasks needed to produce the deliverables.
- Identify, track, and manage relevant tasks and assignees with a WBS dictionary (or work package).
- Agile – The team handles task identification and tracking as part of iteration planning.

GUIDELINES

Determine and Bestow Levels of Decision-Making Authority

- Team members should identify, plan, and manage tasks
- Teams performing work should also perform estimates for the work
- Empower teams to drive their own improvement

Train Team Members and Stakeholders

TOPIC E

Deliverables and Tools

- Training and mentoring plan
- Training cost estimates
- Training calendar
- Training assessment
- Certifications

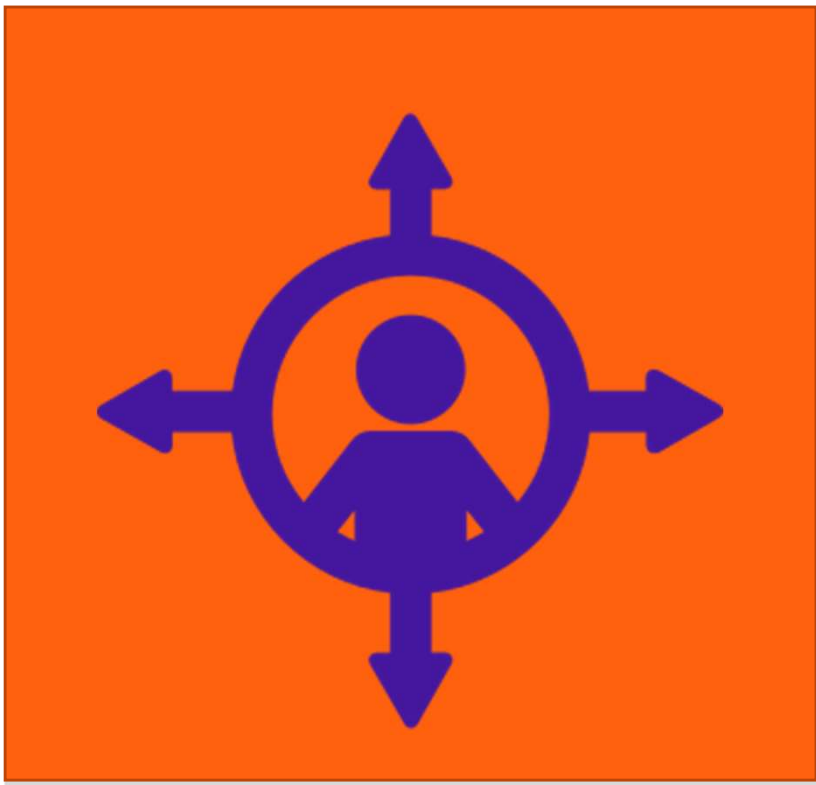
- Training gap analysis
- Training
- Pairing and mentoring

Training and Coaching Plan

Training and Coaching

Training focuses on building individual skills for use in the present.

Coaching helps develop well-rounded individuals through long-term professional relationships between novice and experienced employees.



Training and Coaching Plan

Schedule training close to the time of solution implementation. This is critical to avoid delaying the overall solution deployment.

Perform a gap analysis to identify required knowledge, skills, or attributes.

Consider upskilling or certification for team members. This ultimately benefits the project.

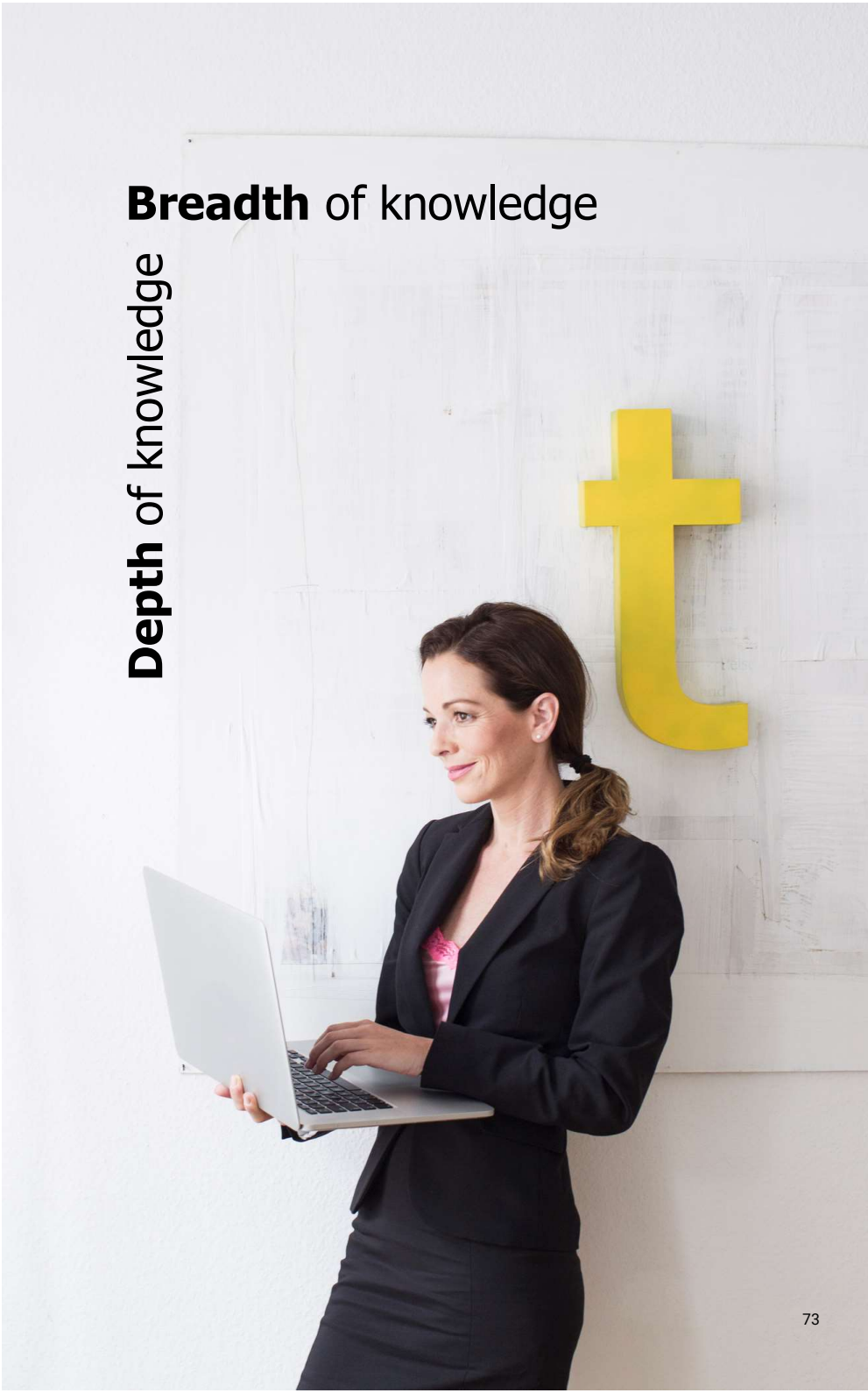
Plan for a suitable diversity of training and coaching offerings.

T-Shaped Skills

Agile teams invest in becoming more cross-functional.

Leveraging all team members to help accomplish the team goals improves:

- ✓ The team's efficiency
- ✓ The likelihood of achieving objectives



Required Competencies

- ✓ Identify required competencies prior to developing and executing a training plan.
- ✓ Competencies include knowledge, skills, and other attributes.
- ✓ Stakeholders have unique training needs.
- ✓ Train team members on the customer's business, culture, desired outcomes, and project context.

Elements of Training

Provided to teams, small groups, and individuals

Covers management, technical, or administrative topics

Delivery models:

- ✓ Instructor-led classroom
- ✓ Virtual classroom
- ✓ Self-paced e-learning
- ✓ Document reviews
- ✓ Interactive simulations
- ✓ On-the-job training

Training Options

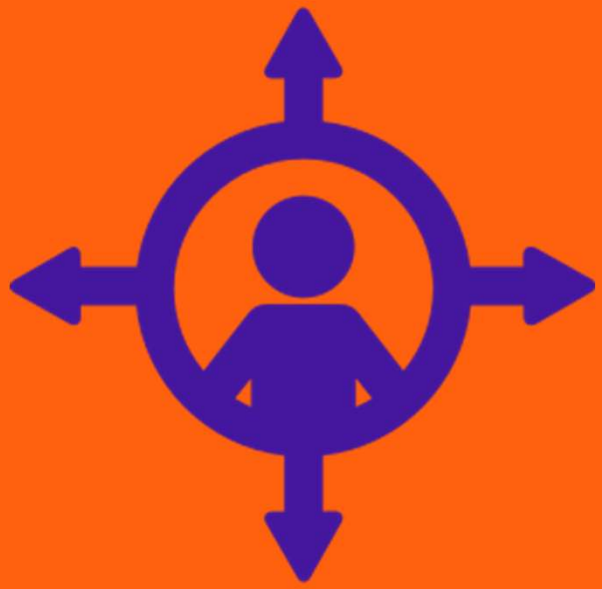
Options	Description
Virtual Instructor-led training	• Live, online, instructor-led training through a virtual meeting or virtual training environment. • Simulated hands-on labs are possible.
Self-paced eLearning	• Content available to students online. This can include rich-media video, simulated lab exercises, etc. • This solution is scalable to a large number of students.
Document reviews	• For simple knowledge transfer, sharing relevant documents may be sufficient.

Training Cost and Schedule

Consider the costs of training the project team and customer stakeholders as **part of the project budget**.

Use a training calendar to:

- ✓ Publish and support a specific calendar of training dates and locations.
- ✓ Publish schedule to customer stakeholders.
- ✓ Create a mechanism for registration and sending confirmation messages.
- ✓ Provide class rosters and a way to capture signatures of attendees.
- ✓ Manage the training schedule to avoid delaying the project delivery timeline.



Pairing and Coaching

Pairing customer stakeholders together reinforces the learning through collaboration.

Coaching enables an experienced team member to coach a less-experienced team member:

- ✓ Fosters team building and a collaborative environment.
- ✓ Relationships can be informal or ad-hoc, created by the individuals themselves or formally established by the organization.

Certifications

Demonstrate that knowledge and skills have been gained during training.

Industry credentials are portable and valuable to individuals and future employers.

PMP

CAPM

PgMP

PMI-ACP

Baseline and Post-Training Assessments

Baselining is a technique for measuring the efficacy of training.

- ✓ Attendees complete a pre-assessment **before** training.
- ✓ **After** training, use an assessment to demonstrate the newly acquired levels of competence.

GUIDELINES

Ensure Training Occurs

- Create awareness among stakeholders about available training.
- Invite people to attend training.
- Engage with customer to ensure commitment to employee training programs on the solution.
- Include confirmation of registration, a notification, and reminder before the training.
- Use rosters and capture signatures to confirm attendance and participation.

Engage and Support Virtual Teams

TOPIC F

Deliverables and Tools

Collaboration technology

Engagement assessments

Project or Resource Calendar

Communication

Communication plan

Variance analysis

PM Powers

Collaboration Technology

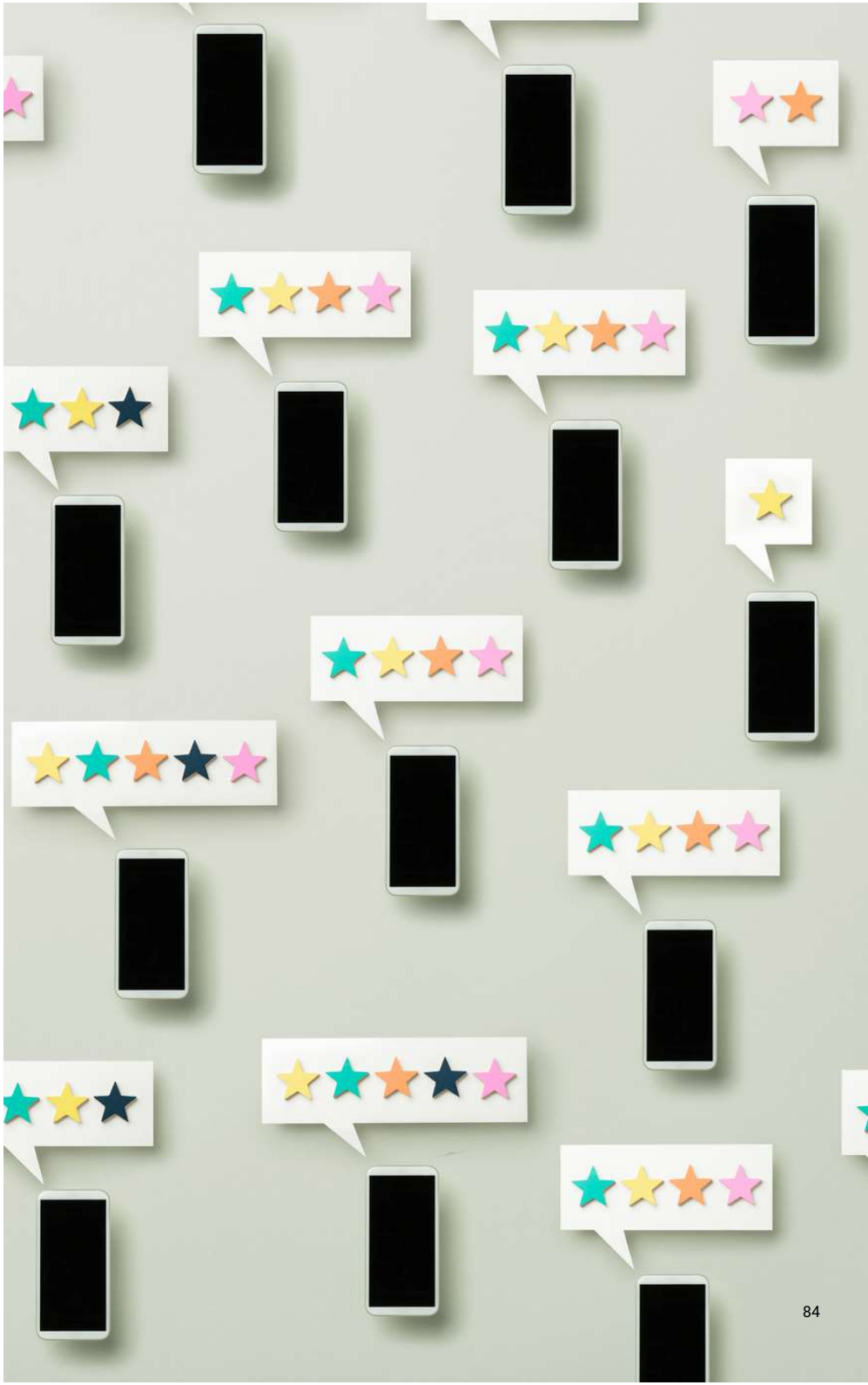
Enables teams to **plan, collaborate, and communicate.**

Not a substitute for team planning activities.

Consider **transparency requirements** when selecting collaboration technology.

Collaboration tools might include:

- ✓ Shared task boards - To promote visibility
- ✓ Messaging and chat boards - To enable communication
- ✓ Knowledge repositories - To store shared documents
- ✓ Video-conferencing tools - For face-to-face communication



Virtual Team Member Needs

Facilitate and ensure collaboration as a priority.

Basic needs of a virtual team:

- ✓ Shared goals
- ✓ Clear purpose
- ✓ Clarity on roles and expectations

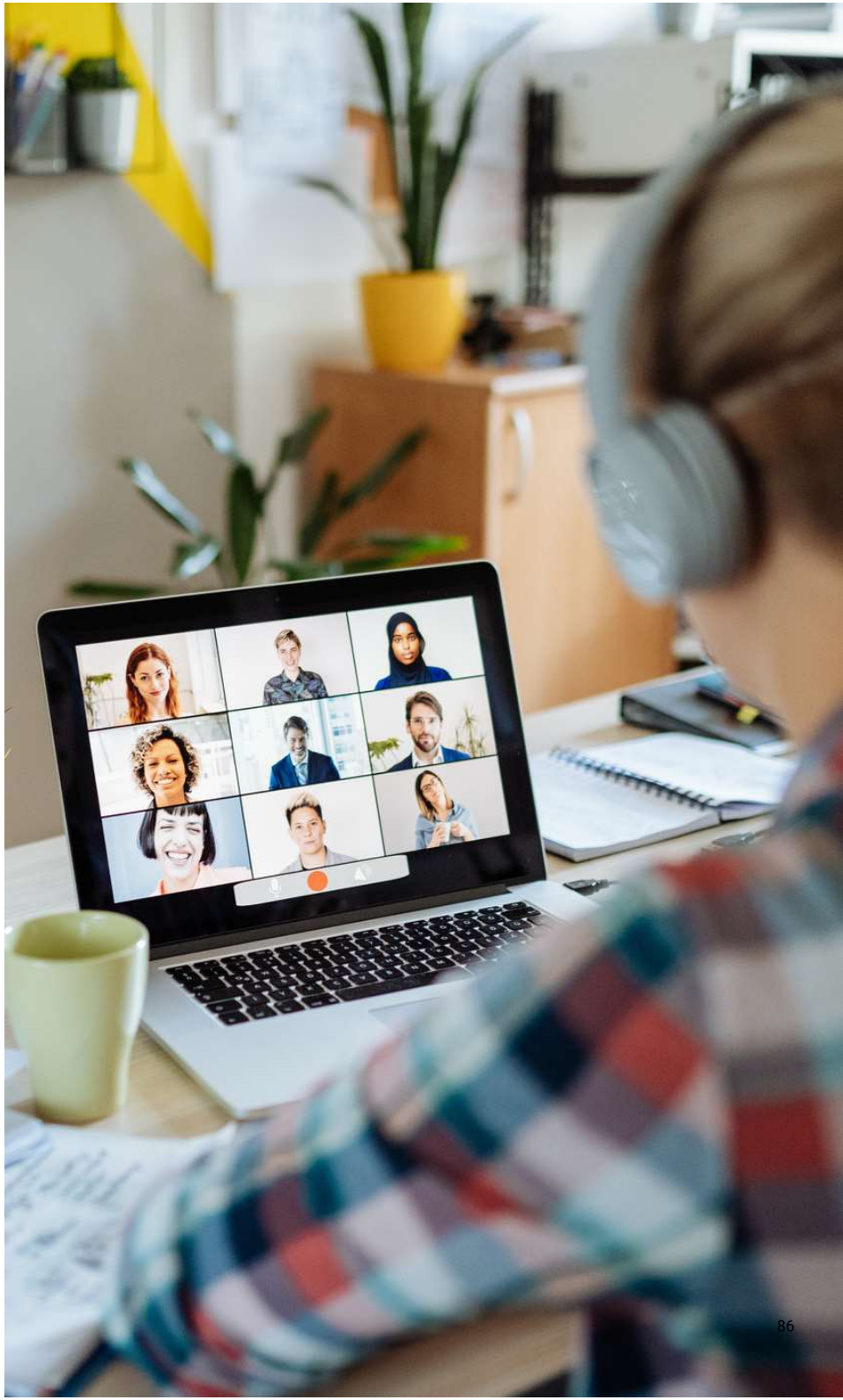
Virtual Team Member Engagement

Manage engagement by focusing on:

- ✓ Team dynamics
- ✓ Transparency
- ✓ Accountability
- ✓ Attention to effective communication

Use videoconferencing tools to facilitate active participation and the ability to assess body language and tone.

Enable visibility of work and work status with tools e.g. Kanban-style boards.

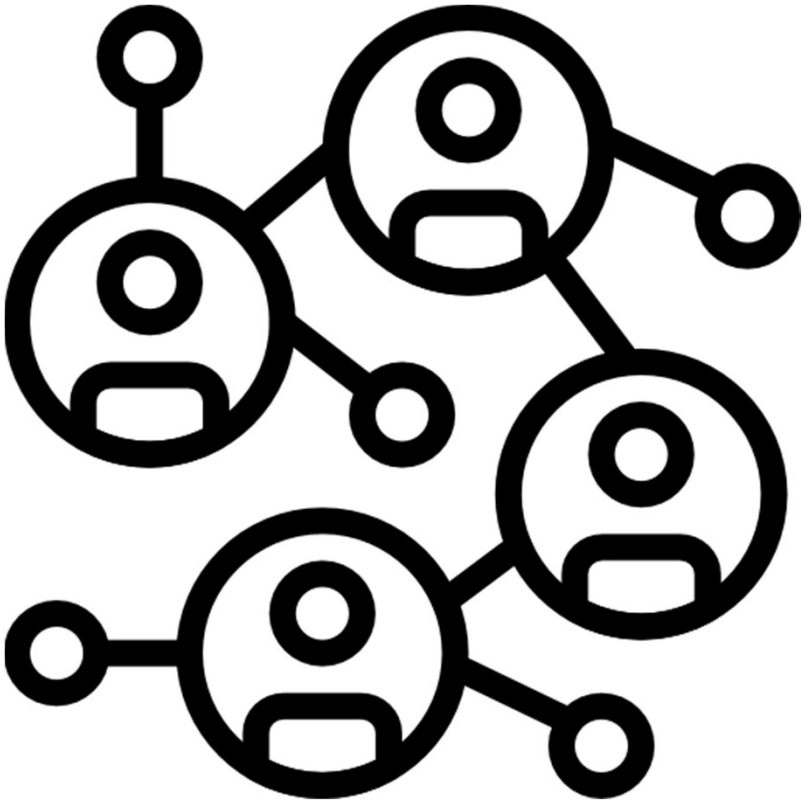


Communication

Effective communication is the key to successful teams.

Include communication expectations and details in the **team charter**.

Use **retrospectives** to learn ways of improving communication, collaboration, and use of visibility tools.



Engagement Assessments

Use Stakeholder Engagement Assessment Matrix - Compares current and desired stakeholder engagement levels.

Communications Plan

Create the initial team communications plan.

Components include:

- ✓ Team meeting times
- ✓ Tools to track work status
- ✓ Frequency of work status updates
- ✓ Shared team hours
- ✓ Preferred communication approaches

Encourage the team to adopt its own practices and drive iterative improvements to communication approaches.

Aim for effective collaboration and broad, accurate visibility across stakeholders.

GUIDELINES

Implement Options for Virtual Team Member Engagement

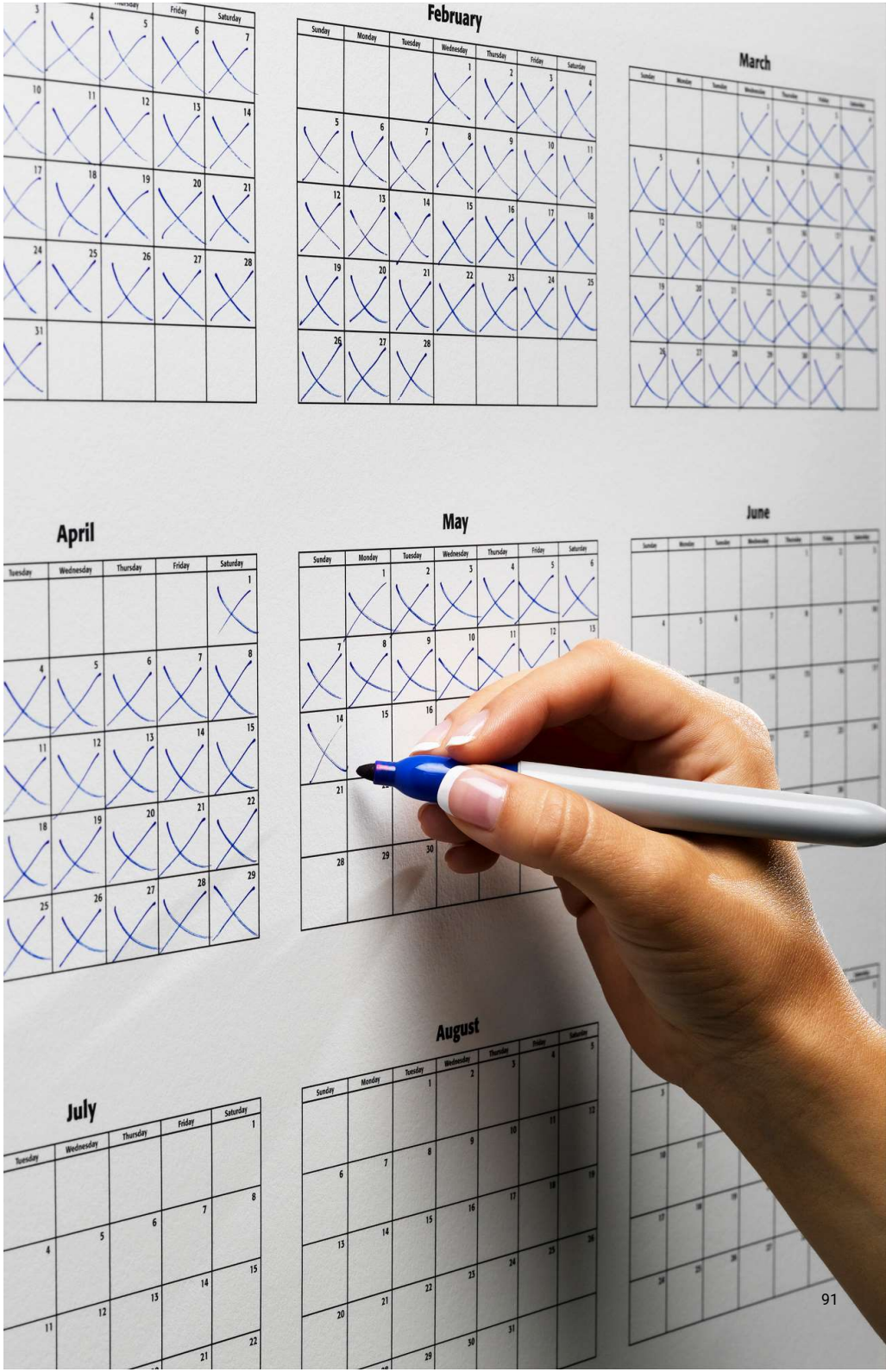
- Focus on collaboration and team norms before focusing on tools.
- Recognize that team formation in a virtual environment is difficult, so reinforce the teams' mutual commitments, achievements, and opportunities.
- Virtual teams require a significant amount of feedback and reinforcement of team goals and objectives.
- Provide opportunities for members of a virtual team to meet in person to build relationships that nurture their shared commitment to project goals.

Calendar Tools

Shared calendars help virtual teams plan meetings, coordinate feedback, and improve visibility to goals and activity status.

Timeboxed meetings:

- ✓ Improve focus
- ✓ Encourage team to set clear agendas and objectives
- ✓ Help keep the work on track



Variance Analysis

As the team works, produce variance analyses, such as:

- ✓ Accuracy of team estimates
- ✓ Delivery in a sprint or by an established milestone
- ✓ Team performance against targets

Results of a variance analysis may be shared as part of a retrospective to serve as:

- ✓ A basis for problem solving
- ✓ Identification of lessons learned
- ✓ Proposed improvement experiments for subsequent iterations

Virtual Team Best Practices

Manage inherent risk of individual team members becoming isolated.

Focus on shared commitments vs. individual accomplishments for tasks.

Instill a sense of shared commitments in the team:

- ✓ Start with the team charter
- ✓ Then adopt behaviors to reinforce collaboration and promote visibility

Prioritize team goals over individual performance.

Enable teams to self-organize and be accountable for deliverables.

Build a Shared Understanding About a Project

TOPIC G

Deliverables and Tools

Vision

XP Metaphor

Product box exercise

Charter

Project Plan

Kick-off meeting

Brainstorming

T-Shaped Skills

Project Vision

At the start of a project, you need a **clear vision of the desired objectives**. You also need to understand and appreciate how the **project vision aligns with the organization's strategic goals**.

You are the steward of this vision, and it's up to you as the project manager to ensure the project delivers.

A vision statement might include:

- ✓ Product or solution description
- ✓ Intended users or consumers of the solution
- ✓ Key desired objectives
- ✓ Differentiators from competitive approaches
- ✓ Key features and benefits

Project Charter

DEFINITION

A document issued by the project initiator or sponsor that formally authorizes the existence of a project and provides the project manager with the authority to apply organizational resources to project activities.

Project Charter Contents

- ✓ **Assigned project manager and responsibility / authority level**
- ✓ **Name and authority of project sponsor**
- ✓ **Other optional content:**
  - Measurable project objectives and related success criteria
  - High-level requirements
  - High-level project description, boundaries, and key deliverables
  - Overall project risk
  - Summary of milestone schedules
  - Pre-approved financial resources
  - Key stakeholders register
  - Project approval requirements
  - Project exit criteria

Project Overview Statement

Communicates enterprise-wide the **intent and vision** of the project.

Written with **brevity and clarity**.

Captures the project's **objective, problem or opportunity**, and **criteria for success**.

Authorization via the project charter or **approved project overview statement enables kickoff activities** of project planning.

How to Run the Project

After you have captured the project vision and understand the types and conditions around the deliverables, **you need to decide** how you will run the project.

Choose from **traditional, agile, and hybrid** approaches and methods.

Kickoff Meeting

Meeting goals:

- ✓ Establish project context
- ✓ Assist in team formation
- ✓ Ensure team alignment to the overall project vision

Activities during kickoff may include:

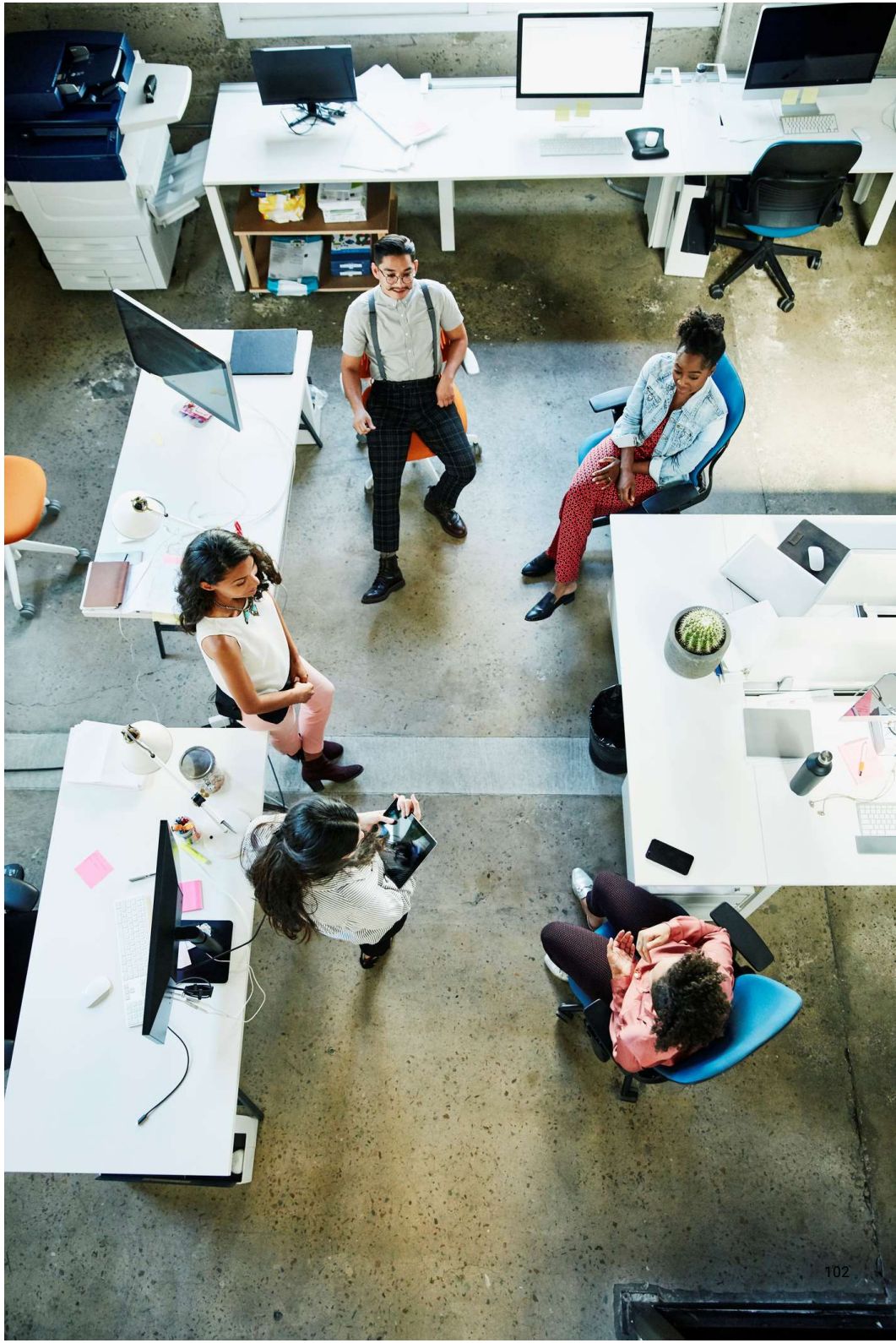
- ✓ Defining a vision statement
- ✓ Defining a team charter
- ✓ Assisting the customer/Product Owner with:
  - User story writing
  - Estimation of effort
  - Prioritization planning
  - Initial product backlog

Iteration Planning

Iteration planning is a collaborative agile ceremony, sometimes called **Sprint planning**, for the team and the customer representative (or Product Owner) to do the following:

- ✓ Review the highest prioritized user stories, or key outcomes.
- ✓ Ask questions.
- ✓ Agree on forecasts for story completion in the current iteration.

After agreement, the team determines the activities required to deliver iteration objectives.

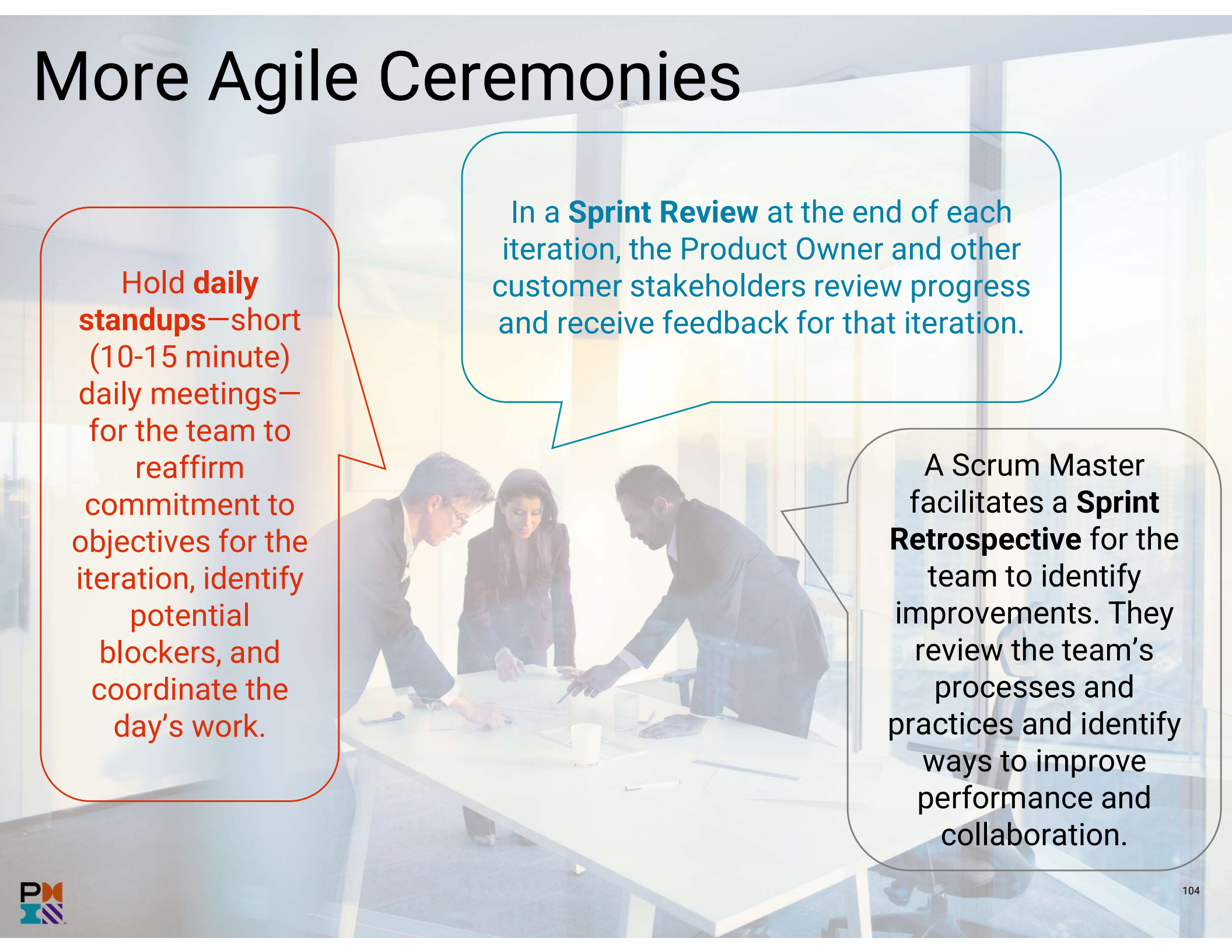


Overview - Agile Ceremonies

More Agile Ceremonies

Hold **daily standups**—short (10-15 minute) daily meetings—for the team to reaffirm commitment to objectives for the iteration, identify potential blockers, and coordinate the day's work.

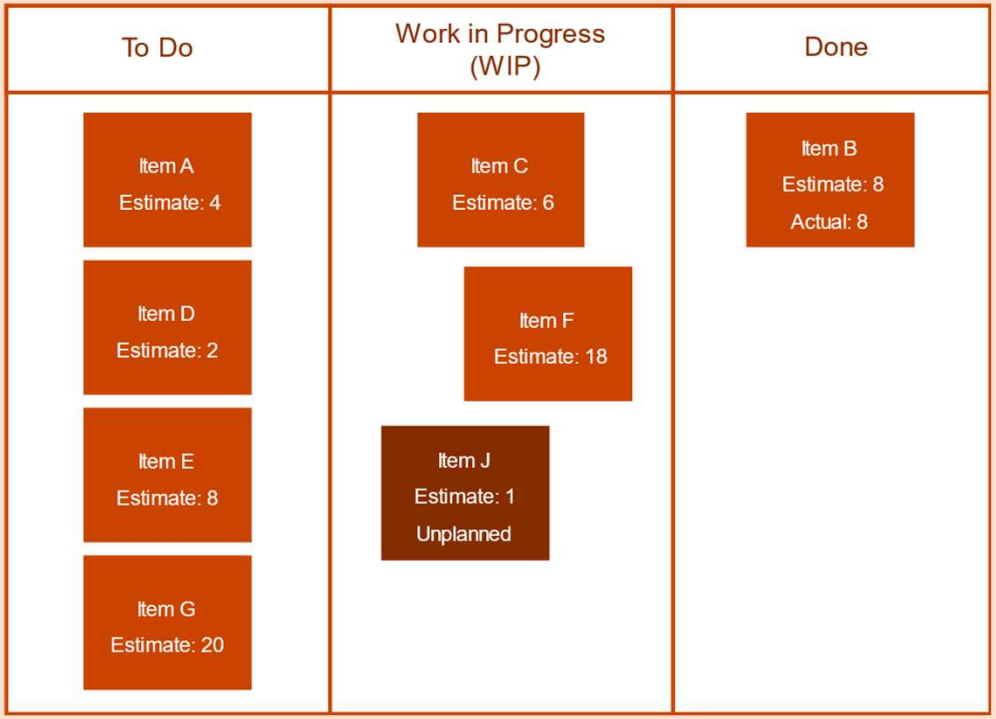
In a **Sprint Review** at the end of each iteration, the Product Owner and other customer stakeholders review progress and receive feedback for that iteration.



A Scrum Master facilitates a **Sprint Retrospective** for the team to identify improvements. They review the team's processes and practices and identify ways to improve performance and collaboration.

Task Boards

- ✓ Visualize work and enable the team and stakeholders to track progress as work is performed.
- ✓ Promote visibility and maximize efficiency and accountability.
- ✓ Examples: Kanban boards, to-do lists, procedure checklists, and Scrum boards.



Consensus

DEFINITION

Consensus is a collaborative process to reach a decision that everyone can support.

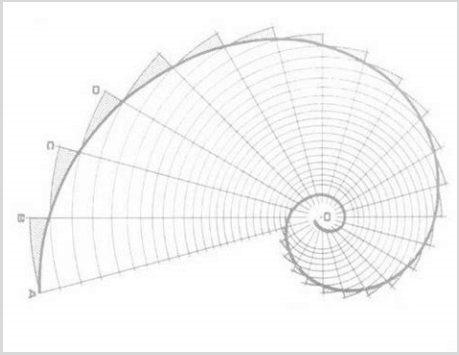
Reach Consensus

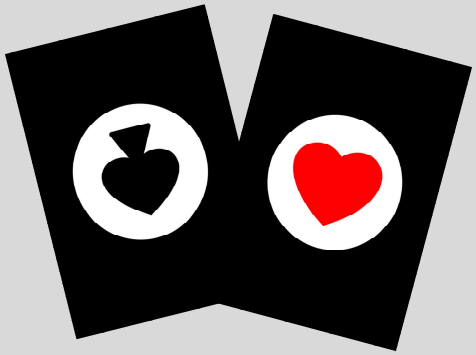
Method	Best for	How It Works
Fist of Five	Expression of range of agreement	Closed fist = complete disagreement Fist of 5 – complete agreement
Roman Voting	Simple yes or no	Thumbs up or down (sometimes sideways for neutral)
Polling	Consider independent points of view	Hear opinions and then vote
Dot Voting	Select several options from a list	Distribute dots equally, then each person allocates dots according to highest preference

Estimation Techniques

Planning poker estimates effort or relative size of development effort. Use a deck of cards with modified Fibonacci numbers to vote on user stories. Also called **Scrum poker**.

Story Pointing
Use a relative measure e.g. numbers in the Fibonacci sequence—for the level of difficulty or complexity of a feature. Individuals assign story points.



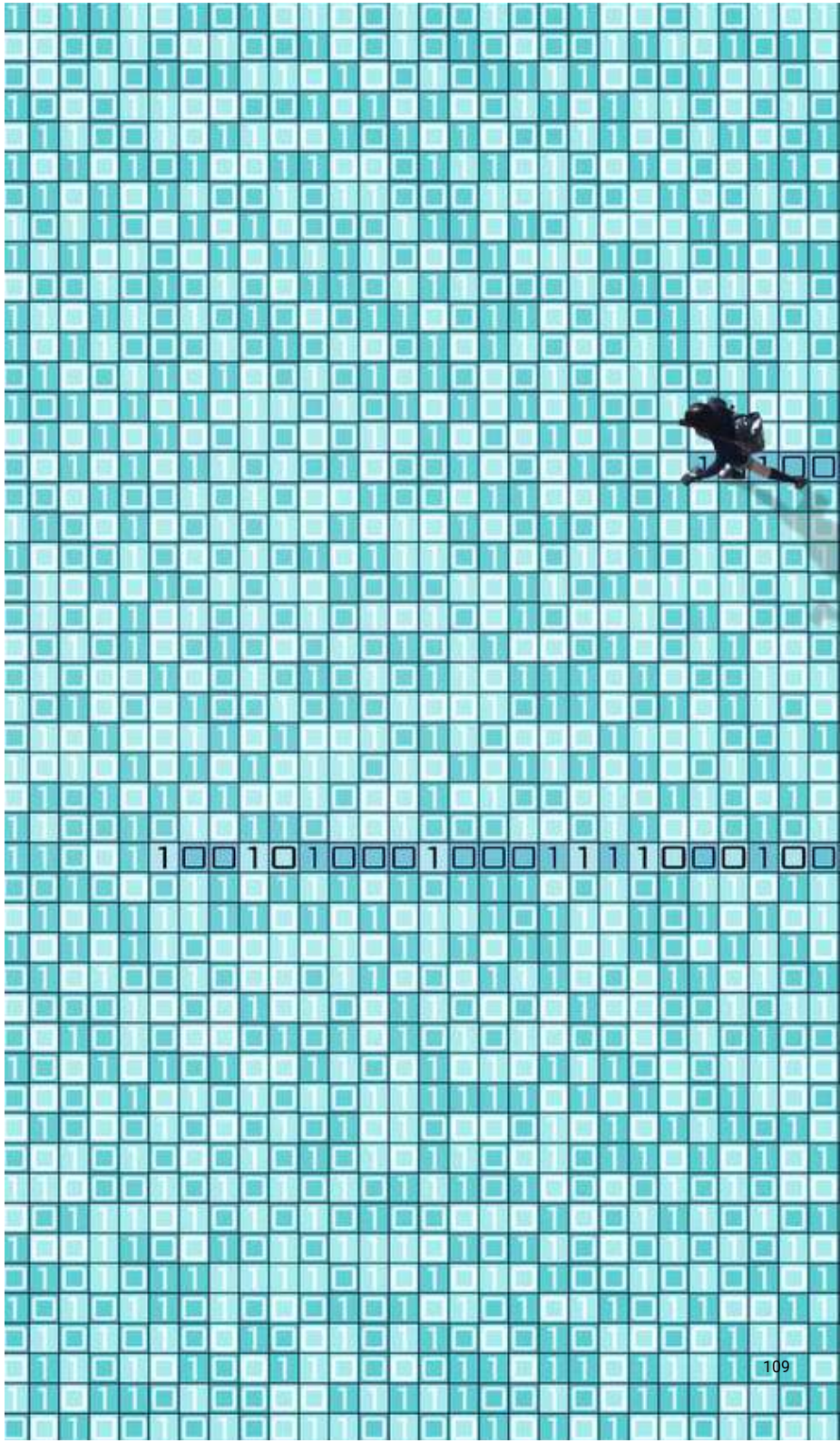


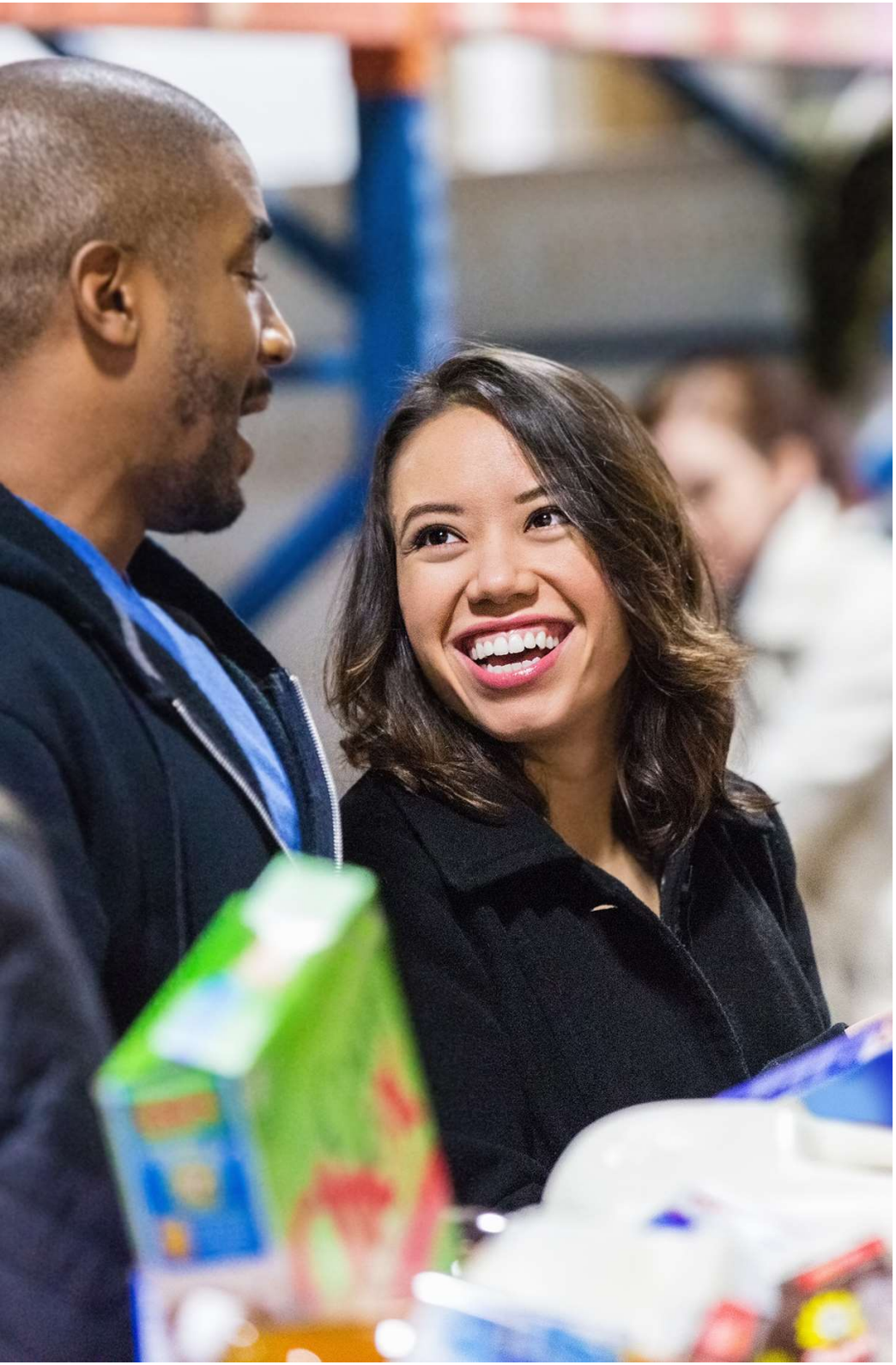
XP Metaphor

Metaphor is an Extreme Programming (XP) technique that **describes a common vision** of how a program works.

Metaphors should be simple and non-technical.

Enables the team to understand the overarching approach that is being taken to provide a capability or solve a problem.





Product Box – Collaboration Game

Technique used to explain an overarching solution.

Stakeholders try to **describe aspects of a solution** in the same way a marketer might describe **product features** and **benefits** on a box.

Helps with understanding:

- ✓ Different types of users of a solution
- ✓ Their priorities and likes/dislikes
- ✓ Key aspects of a solution that drive the most critical value aspects

GUIDELINES

Reach Consensus and Support the Outcome of the Parties' Agreement

- Team charter can specify how team chooses to handle certain scenarios and disagreements when they arise:

  e.g. if team members disagree about the number of story points to estimate for a user story, the team charter may designate use of the higher estimate or that majority vote rules.

- Seek consensus among the team where possible and recognize that sometimes it will not be possible.

End of Module 1